



SECTION 7

ACTION IMPLEMENTATION PLAN

7.1 INTRODUCTION

This Section describes how the Catawba County Parks Division can implement a safe, convenient, and usable park system through the execution of its established goals in the Comprehensive Parks Master Plan. The strategy for achieving goals involves the recommended park and greenway facilities discussed in Section VI. This section deals with strategies and opportunities, key implementation steps (implementation policies), necessary staffing, and methods for developing facilities. Together, these sections fit together to form the implementation program.

The results of the Catawba County Comprehensive Parks Master Plan are based on the following discovery methods: 1) a review of the study area, which is within the County limits, 2) an analysis of the existing parks and facilities; 3) community input; and 4) recreation standards, which have been generically developed for municipalities and county governments. The Comprehensive Parks Master Plan is designed to be action-oriented and serve as a tool in the improvement and enhancement of the park system for Catawba County Park Division.

Identification of sufficient funding is a crucial element that is required to implement the Master Plan – considering, in particular, the County's budget constraints. The North Carolina Statewide Comprehensive Outdoor Recreation Plan is a guide by which inadequate funding for park and recreation facilities may be identified. *Insufficient funding* will be a key issue that will need to be addressed in the upcoming years if government continues to provide basic minimum services. According to the U.S. Census Bureau, North Carolina and its local governments are 33% below the national average in the funding of parks and recreation services.

Data from the N.C. Recreation Resources Service (RSS) Executive Summary

Per Capita Expenditures by Population

The population estimates used in the RSS report were certified county estimates in July, 2005. The estimates were calculated by the State Demographer, Office of State Budget and Management, and North Carolina Office of the Governor. They were provided online at <http://demog.state.nc.us>. The following agencies represent Population Class A, which are the departments serving populations greater than 100,000.



The chart is not a complete county listing, but only includes those counties which replied to the RSS survey. Of the 12 counties that responded to the survey, the 4 listed on table 7.1 below provide passive recreation only. The other 8 provide both passive and active recreation.

Table 7.1 COUNTIES (serving populations of over 100,000)	POPULATION ESTIMATE - 2005	PER CAPITA EXPENDITURE
Rowan County Parks & Recreation	133,339	\$ 31.49
Cabarrus County Parks & Recreation	150,434	\$ 5.96
Wake County Parks & Recreation	750,865	\$ 6.32
Catawba County Parks Division	149,032	\$ 1.89

Per Capita Expenditures by Region

The RSS Executive Summary provides information on geographic regions as well as departments with similar populations. Leisure needs and desired services vary in different areas across the state; therefore, the geographic regions representing five distinct areas in North Carolina are the Northeast, Piedmont, Southeast, West-Central, and Western. The Catawba County Parks Division is located in the West-Central region and includes the counties of Alexander, Alleghany, Anson, Ashe, Cabarrus, Catawba, Davidson, Davie, Forsyth, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Stokes, Surry, Union, Watauga, Wilkes, and Yadkin

To meet the existing and future needs of Catawba County Parks Division, the goals and objectives, which are identified in the Master Plan, must be seriously considered for implementation. The County should continue to establish annual budgets for the Parks Division based on projected capital improvement costs, staffing needs, and operations/maintenance costs. The following Operating Budget (depicted on Table 7.2.1) and Capital Improvements (depicted on Table 7.2.2) are for the first 10 years and beyond, of the Comprehensive Parks Master Plan.

7.2 PROPOSED OPERATING BUDGET

The proposed operating budget includes cost for staff, operations, and general maintenance requirements similar to those currently being performed by the Parks Division.



Recommended Personnel for Full-Time Operation

Adequate staffing of each park during operational hours is essential to maintaining a clean, safe environment. Staffed facilities experience less vandalism and virtually no incidence of crime. During the public hearings prior to and during the creation of Riverbend and Bakers Mountain Park, the public deemed **adequate park patrol and staffing** as their most important issues of concern.

In accordance with Recommendation #21 in Section VI, the following personnel are recommended for 6-day operation. Currently, Catawba County Parks Division operates Riverbend and Bakers Mountain Parks 4 days a week, with one full-time park ranger and one part-time attendant per park. This schedule does not fulfill the requirements of “recommended and accessible hours open to the public” per State PARTF grant policy. (See Table 7.2.1 - 10-year and beyond Operating Budget)

Division Staffing

Parks Division Manager

- *Manage budget and finances for the Parks Division*
- *Manage personnel supervision, timesheets and employee reviews*
- *Manage grant applications and documentation*
- *Project management and supervision*
- *Master plan implementation and review*
- *Community liaison*
- *Fill in during the absence of a Supervising Park Ranger during, holidays, peak hours, etc.*
- *Emergency on call status*
- *Develop and manage operational policy and procedure*

Volunteer and Programming Coordinator (Proposed new position)

- *Organize regular volunteer projects, scheduling and supply acquisition*
- *Create and prioritize volunteer projects and opportunities*
- *Schedule and organize regular and special events*
- *Marketing and website management*



Park Staff (Per park for full-time operation, 6-day week)

Supervising Park Ranger (1 person per park)

- *Basic daily supervision of other park employees and daily operations*
- *Conducts on site educational programs*
- *Emergency on call status*
- *Supervise basic park maintenance*
- *Execute specialized park maintenance and storm cleanup*
- *Initial supervision of volunteers*
- *Presents interpretive and educational programs off site*
- *On duty during special events, holidays, and peak hours*
- *Coordinate all first aid and safety training.*
- *Patrol park and identifies safety issues*
- *Scheduling of park personnel*
- *Insures policy and procedure are followed during daily operation by park staff*
- *Assists Park Manager in development and execution of parks goals and operations*
- *Assures all fees are collected and daily balance is correct*

Park Ranger (1 person per park)

- *Executes park maintenance and daily operations*
- *Assists in supervision of volunteers*
- *Executes ongoing park projects*
- *Patrol park and greets patrons*
- *Works with Park Attendants to achieve daily goals as directed by Supervising Park Ranger*
- *Assists Supervising Park Ranger in development and execution of parks goals and operations*
- *Assures all fees are collected and daily balance is correct*

Park Attendant (1 full time and 2 part-time persons per park)

- *Greets public and provides park information*
- *Collects fees and issue permits*
- *Data entry of statistics, permits, and daily log information*
- *Basic janitorial duties*
- *Confirms reservations*
- *Assists Park Ranger in assigned projects*



- Works with part time
- Assists Park Ranger in development and execution of parks goals and operations

**Table 7.2.1 - CATAWBA COUNTY - COMPREHENSIVE PARKS
 MASTER PLAN, 2007-2017
 OPERATING BUDGET**

CATEGORY	Current- 4 day	YEAR 1 - 6 day
Number of Parks in Operation	2	2
Number of Days Open	4	6
Number of Employees	3 FT, 2 PT	7 FT, 2 PT
Total Annual Operating Budget	\$243,020.00	\$382,441.76
OPERATING BUDGET PER PARK	\$121,510.00	\$191,220.88

7.3 CAPITAL IMPROVEMENT PROGRAM

The Capital Improvement Program for the acquisition and development of park facilities is designed to encompass the first ten-year period of the Comprehensive Parks Master Plan. All of the proposed costs are based on 2007 materials/labor costs, with no economic changes factored into the yearly increments. Capital improvement costs include *general* expenditures, such as site preparation, access, site utilities, and parking - along with *specific* recreation improvements. The capital improvement plan does not include estimates for planning/design fees.

The capital improvement program can be summarized into the following components:

• Renovation/Improvement Program	\$400,000
• Land Acquisition Program	\$1,200,000
• Park Development Program	\$3,641,500
• <u>Greenway Acquisition and Development</u>	<u>\$600,000</u>
Total Capital Improvement Cost	\$5,841,500

The total figure represents capital spending over a 10-year period and beyond. This \$5,841,500 can be supplemented through grants as shown on Table 7.3.1 - 10-year and Beyond Capital Improvements Program. Numerous grant



opportunities are available as described in Sections 7.4 and 7.5. The Total Capital Improvement Cost represents the estimated cost projections to be needed in association with parks facility development, improvements, renovations, and reflects the goals and recommendations outlined in *Section 6 Goals and Recommendations* of the Comprehensive Parks Master Plan.

The proposed Capital Improvement Program for the Catawba County Parks Division is depicted on the following table:

Table 7.2.2 - 10 Year Capital Improvements Program

CATEGORY / IMPROVEMENT	TOTAL 10 YEAR COST	County Match	Grant Match	Grant/Fund	
General Park Improvements					
Park Renovations	\$400,000				
SUBTOTAL	\$400,000				
Land Acquitision					
Land Acquitision	\$1,200,000				
Jacobs Fork Greenway 40 Acres @ \$5,000/Ac.					
Henry Fork Greenway 50 Acres @ \$5,000/Ac.					
Lyle Creek Greenway 40 Acres @ \$5,000/Ac.					
Land Acquitision for Park Expansion					
SUBTOTAL	\$1,200,000				
Riverbend Park					
Primitive Camping (20 Sites)	\$40,000				
Rangers Residence	\$40,000				
Land Acquisition included in Land Acquisiton Above	\$0				
SUBTOTAL	\$80,000				
Bakers Mountain Park					
Land Acquisition included in Land Acquisiton Above	\$0				
SUBTOTAL	\$0				
Bunker Hill Bridge Park					
Information kiosk	\$5,000				
I-40 Rest Area Greenway	\$330,000				
Multi-Use Building	\$260,000				
Restroom Building	\$30,000				
Access Road and Parking Areas	\$300,000				
Trail System	\$80,000				
6' Wide Bridge Crossing	\$15,000				
Dog Park	\$37,000				
Outdoor Classroom	\$10,000				

Table 7.2.2 - 10 Year Capital Improvements Program

CATEGORY / IMPROVEMENT	TOTAL 10 YEAR COST	County Match	Grant Match	Grant/Fund	
General Park Improvements					
10' Pedestrian Bridge	\$80,000				
Stream Bank Restoration	\$10,000				
Picnic Shelter	\$40,000				
Picnic Shelter	\$25,000				
Utilities	\$60,000				
SUBTOTAL	\$1,282,000	\$782,000	\$500,000	PARTF	
Mountain View Recreation Association					
Restroom Renovation	\$15,000				
Parking Renovation	\$15,000				
SUBTOTAL	\$30,000				
St. Stephens Park					
Pool Removal	\$8,500				
Restroom Renovation	\$20,000				
Dog Park	\$37,000				
Picnic Shelter and Table Renovation	\$34,000				
Horseshoe Pits	\$8,000				
Landscaped Nature Trail	\$4,000				
1.2 mile ADA Trail	\$60,000				
Additional Landscaping	\$15,000				
SUBTOTAL	\$186,500	\$33,300	\$133,200	LWCF	
Jacobs Fork Greenway					
11 Mile Greenway (\$300,000/Mile)	\$0				
Assuming 3.6 Acres/mile					
SUBTOTAL					
Henry Fork Greenway					
14 Mile Greenway	\$0				
Assuming 3.6 Acres/mile					
SUBTOTAL	\$0				
Lyle Creek Greenway					
11 Mile Greenway (Phase 1 - 2 Miles)	\$600,000				
SUBTOTAL	\$600,000	\$120,000	\$480,000	NCDOT	

Table 7.2.2 - 10 Year Capital Improvements Program					
CATEGORY / IMPROVEMENT	TOTAL 10 YEAR COST	County Match	Grant Match	Grant/Fund	
General Park Improvements					
Mountain Creek Park Improvements(Phase 1)					
Access Road and Parking Areas	\$600,000				
Rangers Residence	\$40,000				
Multi-Use Building	\$250,000				
Trail System	\$200,000				
Primitive Camping (20 Sites)	\$40,000				
Open Meadow	\$25,000				
Picnic Shelter (4)	\$130,000				
Fishing Pier	\$12,000				
Canoe Portage	\$6,000				
10' Pedestrian Bridge	\$70,000				
Utilities	\$100,000				
SUBTOTAL	\$1,473,000	\$973,000	\$500,000	PARTF	
Murrays Mill Park Improvements					
Trail Development	\$100,000				
Environmental Education Center	\$250,000				
Picnic Shelter (Large)	\$70,000				
Amphitheater	\$100,000				
Picnic Shelter (Large)	\$70,000				
SUBTOTAL	\$590,000	\$272,500	\$272,500	PARTF	
<u>TOTAL CAPITAL IMPROVEMENTS:</u>	<u>\$5,841,500</u>				
Potential PARTF Grant Projects allow a dollar for dollar match up to \$1,000,000 for Land Acquistion, Park Develop and Improvements.					
Potential NCDOT Grant Projects allow a 20(governing agency)/80(NCDOT) match for Multi Use Trail Projects, and Support Facilities					
Potential LWCF Grant Projects allow a 20(governing agency)/80(LWCF) match for outdoor park facilities					



7.4 OPPORTUNITIES AND STRATEGIES

The goals and objectives called for in this Master Plan under the current funding levels cannot be realized.

In order to meet the proposed recommendations, substantial increases in operating and capital funding will be required. Over the 10-year and beyond period, the County will not be able to support the proposed capital improvement and operations solely through the current level of funding from County appropriations. The Catawba County Parks Division will need to use a combination of revenue sources from various means to accomplish the recommendations of the Master Plan. Fortunately, there are numerous funding strategies and opportunities that will need to be explored and implemented by the County.

Operating Budget

The General Fund for the Parks Division Operating Budget for the fiscal year 2006/07 is \$243,020. It is recommended that the Operating Budget be increased to \$382,442 for the fiscal year 2007/08 in order to operate Riverbend and Bakers Mountain Parks on a 6-day schedule as reflected on Table 7.2.1. As the County brings new high priority parks online, such as Mountain Creek and Bunker Hill, a significant increase in staff and operating funds will be needed.

Capital Improvement Budget

In addition to the general operation funding for parks, it is recommended that the County allocate a budget for capital improvements of parks. This funding will provide ongoing improvements to existing facilities, land acquisition, and will allow development for new facilities. To generate the funding necessary to develop the recommended improvements (an estimated \$5,841,500, as depicted on Table 7.3.1), the County will need to pursue an aggressive funding program utilizing a variety of revenue sources. If the County is successful in obtaining other funding sources, such as grants, the financial impact on the County's general fund could be substantially reduced. An annual allocation of capital improvement funding by the County, supplemented with grants and other funding sources, will allow renovation of existing facilities, land acquisition and construction of new facilities on a more consistent basis.

7.5 FUNDING/ACQUISITION SOURCES

Implementing the recommendations of this Comprehensive Parks Master Plan will require a combination of funding sources that include local, state, federal, and private money. This Section provides a listing of the most commonly used



funds for park and greenway facility projects in North Carolina. Fortunately, the benefits of protected greenways and parks are many and varied. This allows programs in Catawba County to access money earmarked for a variety of purposes including water quality, hazard mitigation, recreation, air quality, alternative transportation, wildlife protection, community health, and economic development. Competition is almost always stiff for state and federal funds. It becomes imperative that local governments work together to create multi-jurisdictional partnerships and to develop their own local sources of funding. These sources can then be used to leverage outside assistance. The long term success of this plan will almost certainly depend on the dedication of local revenue stream for park and greenway projects.

It is important that Catawba County fully evaluate its available options and develop a funding strategy that can meet community needs, maximize local resources, improve quality of life, and leverage outside funding. Financing will be needed to administer the continued planning and implementation process, acquire parcels or easements, and manage and maintain facilities. Further research into these programs is recommended to determine requirements for specific grants.

McGill Associates advises Catawba County to pursue a variety of funding options. Below is a list of park and greenway funding opportunities that have typically been pursued by other communities. Creative planning and consistent monitoring of funding options will likely turn up new opportunities not listed here.

Grants

State and federal agencies offer numerous grants to assist municipalities in the financing of their parks and recreation projects. This source of funding should definitely be investigated and pursued by the Catawba County for present and future park/recreation improvements.

North Carolina Parks and Recreation Trust Fund (PARTF):

PARTF was established for local governments and the North Carolina Division of Parks and Recreation in 1994 as a funding source for the development and/or improvement of parks and recreation facilities, as well as for the purpose of land acquisition. A state-funded program, PARTF matches monies spent by municipalities (on parks and recreation) – with each sharing 50% of the cost. In 2004, the fund request was elevated from a maximum of \$500,000 to \$1,000,000. The Recreational Resources Service should be contact for additional information at (919) 515-7118.



Land and Water Conservation Fund (LWCF):

A federally-funded program, LWCF was established for local and state governments in 1965 as a funding source for outdoor recreational development and land acquisition. LWCF monies are derived from the sale or lease of nonrenewable resources – primarily, offshore oil/gas leases and surplus federal land sales. Acquisition and development grants may be used for a wide variety of outdoor projects such as city parks, tennis courts, bike trails, outdoor swimming pools, and support facilities (roads, water supply, etc.). Facility design must be rather basic in nature – rather than elaborate – and must remain accessible to the general public. No more than 50% of the project cost may be federally funded by LWCF, although all or part of the project sponsor's matching share may be obtained from certain other federal assistance programs. The federal government has proposed no funding for this program for fiscal year 2006.

North Carolina Natural Heritage Trust Fund

The North Carolina Natural Heritage Trust Fund (NHTF) fund provides supplemental funding to select state agencies for the acquisition and protection of important natural areas, to preserve the state's ecological diversity and cultural heritage, and to inventory the natural heritage resources of the state. Eligible agencies include the Dept. of Environment and Natural Resources, the Wildlife Resources Commission, the Dept. of Cultural Resources, and the Dept. of Agriculture and Consumer Services. Although Catawba County cannot be the applicant, there are state agencies, which could acquire properties, institute programs, etc., in the County for preservation and/or education purposes. Grants are awarded for the following:

- The purchase of lands that represent the state's ecological diversity to ensure their preservation and conservation for recreational, scientific, educational, cultural, and aesthetic purposes.
- The purchase of additions to state parks, state trails, aesthetic forests, wild and/or scenic rivers, and fish/wildlife management areas
- The development of a balanced state program of historic properties
- The inventory and conservation planning of natural areas by the Natural Heritage program



Federal Aid Construction Funds

These funds are included in the National Highway System (NHS) Surface Transportation Program (STP), and Congestion Mitigation and Air Quality (CMAW). The funds provide for the construction of pedestrian and bicycle transportation facilities. The primary source of funding for bicycle and pedestrian projects is STP Enhancement Funding.

Safe Routes to School Program (SRTS)

The Safe Routes to Schools Program is a Federal-Aid program of the U.S. Department of Transportation's Federal Highway Administration (FHWA). The Program was created by Section 1404 of the *Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users Act* (SAFETEA-LU). The SRTS Program is funded at \$612 million over five Federal fiscal years (FY 2005-2009) and is to be administered by State Departments of Transportation (DOT's).

The Program provides funds to the States to substantially improve the ability of primary and middle school students to walk and bicycle to school safely. The purposes of the program are:

1. To enable and encourage children, including those with disabilities, to walk and bicycle to school
2. To make bicycling and walking to school a safer and more appealing transportation alternative, thereby encouraging a healthy and active lifestyle from an early age
3. To facilitate the planning, development, and implementation of projects and activities that will improve safety and reduce traffic, fuel consumption, and air pollution in the vicinity (approximately 2 miles) of primary and middle schools (Grades K-8).

North Carolina Ecosystem Enhancement Program

The N.C. Ecosystem Enhancement Program (EEP) combines a wetlands-restoration initiative by the N.C. Dept. of Environment and Natural Resources with ongoing environmental efforts by the Dept. of Transportation to restore, enhance, and protect its wetlands and waterways. EEP provides:

- High-quality, cost-effective projects for watershed improvement and protection



- Compensation for unavoidable environmental impacts associated with transportation, infrastructure, and economic development
- Detailed watershed-planning and project-implementation efforts within North Carolina's threatened or degraded watersheds

The Safe, Accountable, Flexible, Efficient, Transportation Equity Act of 2004 (SAFETEA).

The Safe, Accountable, Flexible, Efficient, Transportation Equity Act of 2004 (SAFETEA), approved by the federal government in 2004, is a primary source for financing bicycle, pedestrian, and greenway projects throughout the country – both at local and state levels. Providing as much as 80% for development and construction costs, this grant is earmarked for facilities such as sidewalks, rail-trails, bike-lanes and greenways. The Enhancement Program (a section of SAFETEA) is used primarily by municipalities – since this section focuses on bicycle and pedestrian corridors, environmental mitigation, historic preservation, and scenic byways. 20% matching funds is required by the applying entity and applicants must meet several other criteria as well. Prior to applying for this grant, a thorough engineering assessment should be performed to determine construction costs.

Recreation Trails Program

The Recreation Trails Program (RTP) is an assistance program of the Department of Transportation's Federal Highway Administration (FHWA). RTP makes recreation funds available for state allocation to develop and maintain recreation trails and trail-related facilities for both non-motorized and motorized recreation trail users. RTP funds are distributed to states by a legislative formula: half of the funds are distributed equally among all states and half are distributed in proportion to the estimated amount of non-highway recreational fuel used in each state. (Non-highway recreational fuel is the type, which is typically used by snowmobiles, all-terrain vehicles, off-road motorcycles, and off-road light trucks.)

Clean Water Management Trust Fund (CWMTF)

Created in 1996 by the North Carolina General Assembly, the Clean Water Management Trust Fund (CWMTF), grants monies to local governments, state agencies, and not-profit conservation groups to help finance projects that specifically address water pollution issues, CWMTF will fund projects that contribute toward a network of riparian buffers (land that is traversed or bounded by a natural watercourse) and greenways for



environmental, educational, and recreational benefits. There is no match required by local municipalities, however, the “suggestion” of a match is highly recommended.

Watershed Protection and Flood Protection

The USDA Natural Resource Conservation Service (NRCS) assist state and local governments in their operation and maintenance of watersheds, whose areas are less than 250,000 square acres. The NRCS provides both financial and technical assistance to eligible projects to the improvement of watershed protection, flood prevention, sedimentation control, public water-based fish and wildlife enhancements, and recreation planning. The NRCS requires a 50% local match for public recreation and fish/wildlife projects.

State Construction Funds

These funds (not including the Highway Trust Fund for Urban Loops and Interchanges) may be used for the construction of sidewalks and bicycle accommodations that are a part of roadway improvement projects.

The North Carolina Conservation Tax Credit

This program provides an incentive (in the form of an income tax credit) for landowners that donate interests in real property for conservation purposes. Property donations can be fee simple or in the form of conservation easements or bargain sale. The goal of this program is to manage stormwater, protect water supply watersheds, preserve working farms and forests, and set-aside greenways for ecological communities, public trails, and wildlife corridors. (Go to <http://ncctc.enr.state.nc.us/> for additional information,)

Farmland Protection Trust Fund

Ranging from only a couple hundred thousand dollars to millions of dollars over the last several years, this program is funded through an allocation by the NC General Assembly to the NC Department of Agriculture and Consumer Services. It is a voluntary program designed to protect farmland from development by either acquiring property outright or acquiring conservation easements on the property. The program is administered by the Conservation Trust Fund for North Carolina (CTNC). Questions about available funding should be directed to CTNC (Life Estate



Contributions

The solicitation of contributions is an acceptable method of fund-raising for recreation departments. These donations, typical in the form of land, cash, labor, and/or materials, could be solicited to assist Catawba County with its enhancement program. Corporation, civic organization, individuals and other groups generally donate to a “specific” park project; however, donations may also be solicited for multiple project improvements and/or additions. The National Recreation and Park Association recommend the use of private, nonprofit, tax-exempt foundations as a means of accepting and administering private gifts to a public park system.

Park Foundations

Foundations are another source of financing by making direct contributions within communities, states, or the nation. These types of funds are usually described as special program foundations, general-purpose foundation, or corporate foundations. Foundations generally have very few restrictions and/or limitations, and are typically received from local entities. A listing of appropriate foundation can be found in the text entitled *Grant Seeking in North Carolina*, made available through the North Carolina Center of Public Policy Research, Post Office Box 430, Raleigh, North Carolina, 27602.

Partnerships

To implement the recommendations contained in the comprehensive master plan, Catawba County will most certainly have to expand their partnership agreements with other public agencies and private-sector organizations. There are many different types of partnerships that can be formed to achieve the goals established by the County. In fact, many local governments throughout the nation are utilizing partnerships with public and private-sector interest to accomplish community goals.

Listed below are the various types of partnerships that the County should consider in its efforts for the improvement/addition of parks and recreational facilities:

- Programming partnerships to co-sponsor events and facilities or to allow qualified outside agencies to conduct activities on properties, which are municipally owned.
- Operational partnerships to share the responsibility for providing public access and use of facilities.



- Development partnerships to purchase land and/or build facilities.
- Management partnerships to maintain properties and/or facilities.

Catawba County is currently participating with partnerships in other related endeavors/functions; and, should evaluate forming additional partnerships, which address the needs of a comprehensive park system. The County's existing partnership with the Catawba County Historical Society is an excellent example. Direct requests should be made to potential partners, asking them to meet and evaluate the possible benefits of "partnering". This step should be made to generate interest and agreement prior to solidifying any responsibilities for each participating party.

Private-sector partnerships can be beneficial to counties as well. Developers can use private funds to develop facilities on municipal property and lease it to the County over a long term. Over a period of time, the developer returns a portion of the revenue to the County and at the end of the lease; the facility is turned over to public ownership. This type of arrangement would typically be large capital investment for a special use facility.

Land Acquisition and Development

There are many different types of land acquisition available to Catawba County for park system expansion and/or future development. Due to the land costs, as well as land availability, it is recommended that the County prioritize the property to be acquired for park facilities. Listed below are several methods for acquiring and developing parks:

Life Estate

A life estate is a gift – whereby a donor retains the land during his/her lifetime and relinquishes title of the property after his/her death. In return, the owner (or family) is relieved of property tax for the given land.

Local Gifts

Donations of land, money, labor, and/or construction can have significant impact(s) on the acquisition and development of park property. The solicitation of local gifts is highly recommended and should be organized thoroughly, with the utilization of very specific strategic methods. This often (untapped) source of obtaining funds requires the contacting of potential donors – such as individuals, institutions, foundations, service clubs, etc.

Easement

An easement is the most common type of "less-than-fee" interest in land. An easement seeks to compensate the property owner for the right to use



his/her land in some way or to compensate for the loss of his/her privileges to use the land. Generally, the land owner may still use the land and therefore continues to generate property tax revenue for the County.

Fee Simple Purchase

Fee simple purchase is the most common method used to acquire municipal property for park facilities. Although it has the advantage of simplifying justification to the general public, fee simple purchase is the most difficult method to pursue – due to limited monetary resources.

Fee Simple with Lease-Back or Resale

This method allows local governments to acquire land by fee simple purchase: yet allows them to either sell or lease the property to prospective user(s) with restrictions that will preserve the land form future development. The fee simple with lease-back or resale method of development commonly results form situation(s) in which land owner(s), who have lost considerable monetary amounts in property value, determine that it is more economical to sell the land to the County (with a lease-back option) than to keep it.

Long-Term Option

Long-term options allow counties to purchase property over a long period of time. This method is particularly useful because it enables the County to consider particular piece(s) of land that may have future value, though it is not currently desired or affordable at the time. There are several advantages to this method of property acquisition: the County can protect the future of the land without purchasing it upfront and meanwhile, the purchase price of the land will not increase, with the County having the right to exercise its option. The disadvantage to the County is that all privileges relinquished by the land owner require compensation in the form of securing the option.

Dedicated Source of Local Funding

In order to leverage and provide matching funds for many of the programs listed above, Catawba County should enhance its existing Parks Trust Fund by providing a dedicated source of revenue which could come from any number of the following sources:

- Property/sales tax
- Bonds
- Fee in-lieu of contributions
- User fees/registration fees



Property/Sales Tax Revenues

General tax revenues traditionally provide sources for general operations and maintenance park systems for local governments. The Parks Division is scheduled along with health, public safety, utilities, etc. in regular budgets established by the county. Assessed valuation of real and personal property tax and sales tax provides the framework for the major portion of the tax base for the County.

Traditionally, ad valorem tax revenue has been the primary source of funding for the park and recreation enhancement of properties/facilities owned by local governments, “Recreational opportunities” are considered a public service and often are standard line item on general fund budgets. Creative financial opportunities are possible; however ad valorem taxes will continue to be the major revenue source to support the system. As such, communities often vote to raise their local tax rate temporarily in support of their Park and Recreation Systems.

General Obligation Bonds

Many communities issue bonds, which are typically approved by the shareholders, to finance site development and land acquisition costs. The State of North Carolina grants local governments the authority to borrow funds (for parks and recreation) through the issuance of bonds, the amount of which are not to exceed the cost of acquisition or the cost for improvement of a park/recreation facilities. Total bond capacities for local government are limited (for parks and recreation) to a maximum percentage of assessed property valuation. Since the issuance of bonds relies on the support of the voting population, the implementation of awareness programs is absolutely essential prior to a referendum vote.

General Obligation bonds are the preferred financing approach by the North Carolina Local Government Commission and the general securities market, because these instruments are backed by the full faith and credit of the issuer. That simply means that the bonds represent an encumbrance against the property tax base of the issuing jurisdiction and therefore offer the best available security to the bond holder. The State of North Carolina gives the issuance of bonds not to exceed the total cost of improvements (including land acquisition). In view of the recommended capital improvements suggested in this plan, borrowing of funds to acquire new lands and develop facilities may be necessary. Total bonding capacities for local government is limited for parks and recreation to a maximum percentage of assessed property valuation.



The following are key factors to consider related to the use of this financing instrument:

- In North Carolina, the issuance of General Obligation bonds requires a referendum of the voters within the issuing jurisdiction.
- The term of the dept may be extended to 20-30 years.
- The dept is publicly sold, therefore there are costs associated with the sale that generally total 3% to 5% of the total bond principal. The issuance costs offset the lower interest rate and therefore, this instrument becomes more attractive as the size of the issuance increases and the issuance costs are spread over the larger dept. It has been found that this financing option becomes financially superior as the dept principal exceeds \$10-\$12 Million.
- Prepayment of the dept can generally not be accomplished until reaching a call date, which is generally around 75% of dept retirement.
- Failure of the General Obligation Bond to be ratified by referendum could mean that the County could not go forward with an alternative approach to financing without substantially changing the scope of the project.

Fee in-lieu of contributions

Under the Unified Development Ordinance (UDO), developers have an option to pay a fee in-lieu of rather than dedicate open space, within conventional subdivisions. To date, this program has proven to be successful as a dedicated source of revenue that can be earmarked for park development. The County may choose to revisit this source of revenue to study the feasibility of enhancing the fee in-lieu formula.

User fees/registration fees

Communities throughout the nation employ a wide variety of user fees for public use of recreational programs and services within their recreation departments. The "amount" of the fee is usually determined by a portion of the recreation costs needed for improvements and/or operation. These user fees are typically levied for such special facilities as water parks and golf courses; however, they can also be charged of the use of trails and ball fields. Catawba County should continue to generate revenue by charging user fees for use of facilities such as picnic shelters and dog parks in order to cover operation and administrative costs. As the park system continues develop, the County should examine their fees structure



to identify opportunities for additional revenue. The current user fees appear to be fair and reasonable for a majority of the County Residents. Elected officials should determine the fees and charges; however, the fees should not be so high that persons of modest income would ultimately be denied the use of park facilities.

7.6 PLAN ADOPTION

The first step in implementation of the Comprehensive Parks Master Plan is adoption of the plan by Catawba County. By adopting the Comprehensive Parks Master Plan, the community is able to shape larger regional decisions so that they fit within the goals of the plan. The County also gives itself greater authority in shaping local land use decisions so that they achieve the goals and vision of this plan. In addition, the adoption of this Master Plan is essential in order to maximize available grant opportunities.

Among the opportunities to promote the Plan recommendations available to the Catawba County Parks Division is the opportunity to build upon an already committed and active base of residents, visitors, and enthusiasts in the area. Through their organizations, institutions, publications, and networks, Catawba County can promote the improved or new parks and greenway facilities and programs.

Second among the opportunities is the availability of the existing park facilities (amenities, programs, existing trails, etc.). Though some changes are being suggested in the short-term and a much expanded network is suggested for the long-term, the presence of an existing network provides a strong foundation from which to build. Many County residents are already accustomed to using the existing park facilities and should become used to seeing new park amenities, programs, signage, and other improvements. Building on their existing awareness is much easier than building on no awareness.

Action Steps

Upon adoption of this plan, implementation of specific recommendations can begin. Many of these will occur simultaneously and include policy and facility improvement changes. The key steps are:

- Secure dedicated source of revenue to address the 10-year and beyond Capital Improvement Program and address the goals of the Master Plan.
- Appoint a Parks Advisory Committee comprised of County staff and nine representatives located throughout the County which meet periodically to



discuss and advise park planning goals and objectives, user needs and other issues associated with the Catawba County Parks Division.

- Provide staffing necessary to support and oversee the implementation of this plan and the proper maintenance and operation of the facilities that are proposed; for example, the County may designate or hire an employee to oversee this task.
- Create the Catawba County Parks Endowment fund through the NC Community Foundation.
- Develop and implement educational and awareness programs such as public events and promotion of parks awareness by civic/environmental advocacy groups, which can be used to announce new park facilities and some of the upcoming projects.
- Begin working on the proposed facilities that are listed in the 10-year and beyond Capital Improvement Program. From these opportunities comes the framework for an initial implementation strategy:
 - 1) Acquiring land for future park/expansion and greenway corridors should be a high priority. It will be essential to acquire land as opportunities become available.
 - 2) Use the base of park users to expand the awareness of the benefits and operating hours of the Catawba County Park System.
 - 3) Expand and modify the existing park system to a comprehensive, multi-use system, distributed so that it better meets the needs of the community, provides opportunities to all, and enhances the current park system.
 - 4) Begin making the critical greenway connections between destination points that will allow for preservation of open space and offer an alternative mode of transportation.

These four steps represent the core of the implementation strategy. As the individual policy recommendations and physical recommendations are addressed, they should each fit with one of these four primary strategies.

- Ensure that park and greenway planning is integrated with other regional planning efforts at the state and local levels, as well as with long-range and current land use, economic development, parks, environmental, and



community planning. The following are mechanisms to achieve this action step:

1. *Expand local capital improvements program for yearly appropriation for greenway and park development.*
2. *Set aside money for land acquisition, construction and maintenance of parks and greenway facilities in the annual operating budget.*
3. *Pursue and request pedestrian/bicycle projects to be added to NCDOT TIP.*
4. *Pursue developing and expanding existing and new partnerships*
5. *Apply for PARTF Grants and other related recreation grants for park projects and improvements.*
6. *Seek other sources of revenue funding for parks and greenway improvements, such as including local assessment districts, developer exactions, etc.*
7. *Pursue funding from other sources listed in this section.*
8. *Evaluate the enhancement of the existing fee-in-lieu funding formula in the Catawba County Unified Development Ordinance.*

7.7 CONCLUSION

This Comprehensive Parks Master Plan has laid out a set of strategies for expanding/developing a safe, convenient and usable park system as reflected in the following:

- Full-time park system;
- Expansion and enhancement of existing facilities; and
- Creation of new facilities in areas of demand, including Mountain Creek and Bunker Hill Parks.

The plan has assessed the study area, analyzed the existing facilities, received community input, reviewed recreation standards, developed recommendations and provided strategies for implementing the plan. The Comprehensive Parks Master Plan is a comprehensive guide to be used in the improvement and enhancement of the park system for Catawba County Park Division.



- End of Section –